

Pulsar 2.a: magazines as solid connection point, for consumers

With the two waves of Pulsar, an exclusive brand and touchpoints study, Space has been able to demonstrate the strategic benefits of magazines. In particular, in Pulsar 2.a, the latest survey, we point out that, in the eyes of the consumer, attention paid and assets for marketing communications of TV and magazine advertising are fairly comparable. Is this all well-known? Actually the Pulsar view has two differentiating elements: first, it evaluated magazines (ads and editorial) in an “agnostic” way, together with a wide range of alternative touchpoints; second: as far as we know the way it asked consumers about their perception of communication channels is unique.

A SURVEY OF 40 CONNECTION POINTS

After the considerable interest awakened by Pulsar’s first edition (it should be recalled that the study won a Silver Award for Best Media Research 2013 at the AMMA competition ¹), Space has conducted a ‘bis’ study in order to dive deeper into the part about ‘Connection Points’. This study confirms quite a lot of the learnings drawn from the first one concerning communication channels. Yet, it adds a dimension: attention for advertising content.

The exclusive Pulsar ‘2.a’ study took place in August and September 2014. 2.487 respondents aged 15 years and older and representative for the Belgian population were interviewed. As with the first edition, the questionnaire was split up: while none of the respondents filled it in its entirety, the target was approximately 1.000 completes per category, the whole being consolidated within a single, large database.

Unlike the first edition, this survey only covers connection points, not product categories. As such it has proven to be lighter. Nevertheless, it will be shown later that we have added a new dimension, hence an additional section to the research protocol, pertaining to the attention to advertising or to the brand discourse.

Consequently, the new ‘bis’ edition of Pulsar is a partial replication. As in the first wave of surveys, respondents were asked about 40 connection points that can be classified in different ways. Like the ‘POE’ hereafter, which distinguishes ‘Paid media’, those in which an advertiser buys specific advertising space, with predominantly traditional supports; ‘Owned media’, or all media that a brand owns itself, even if they might have been created for one particular

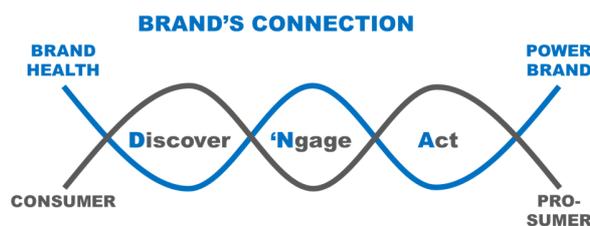
¹ <http://www.grp.be/nl/categorieen/amma-awards/de-winnaars/34/369/winnaars-2014-amma-wards-2013.html>.

occasion, such as events organized by the brand; and ‘Earned media’, or all communication in or outside the media where the brand is mentioned. The latter often stems from the ‘paid’ impulse that triggers communication, or from the ‘owned’ brand’s voice stripped from any intermediary.

Table 1: Pulsar connection points in paid/owned/earned classification

Paid media (24)		Owned connection points (9)	Earned communication (7)
<ul style="list-style-type: none"> • Addressed (e)mail • Ads in social media • Ambient OOH • Banner ads • Brand content in magazines • Brand content newspapers • Cinema ad • FLP ads • Magazines ads • Mobile ad • Newspaper ad • Online video ads • OOH ad in public transport • POS ad 	<ul style="list-style-type: none"> • Radio ads • SMS ads/offers • Special offers in media • Sponsored radio programme • Sponsored TV programme • Sponsored website sections • Street poster ad • TV ad • Product placement TV • Branded TV programme 	<ul style="list-style-type: none"> • Brand page on Facebook • Brand website • Branded shops • Flyers or brochures • Free samples • In store ads • Smartphone apps • Special POS offer • Sponsored events 	<ul style="list-style-type: none"> • Reco by experts • Reco by friends or relatives • Reco by media editorial • Search engines • Shared brand content • Social media conversations • Radio editorial

One can also classify these connection points according to their more or less close proximity to one of the classic Pulsar stages: the ‘Discover’ stage, which may consist of simple awareness, or usage without any real implication; the ‘Engage’ stage, which involves increasing evaluation and approval levels; and, finally, the rarer ‘Act’ phase, where the consumer is convinced of a genuine brand superiority and can even turn himself into an ambassador towards others. Mind you, that does not mean that a ‘discover’ channel could not arouse empathic reactions (Engage), or action: it is simply a matter of closer proximity to a brand relation stage.



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Table 2: Pulsar connection points in DNA (brand relation funnel) classification

Discover (15)	eNgage (13)	Act (12)
<ul style="list-style-type: none"> • Ads in social media • Ambient OOH • Banner ads • Cinema ad • FLP ads • Magazines ads • Mobile ad • Newspaper ad • Online video ads • OOH ad in public transport • Radio ads • Special offers in media • Street poster ad • TV ad • Product placement TV 	<ul style="list-style-type: none"> • Brand content in magazines • Brand content newspapers • Brand page on FB • Brand website • Reco by experts • Reco by media editorial • Smartphone apps • Sponsored events • Sponsored radio programme • Sponsored TV programme • Sponsored website sections • Branded TV programme • Radio editorial 	<ul style="list-style-type: none"> • Addressed (e)mail • Branded shops • Flyers or brochures • Free samples • In store ads • POS ad • Reco by friends or relatives • Search engines • Shared brand content • SMS ads/offers • Social media conversations • Special POS offer



There is also replication as far as the perception measurement is concerned: for every connection point and on a scale of 1 to 10, the respondents have had to commit themselves on each of the following 18 propositions, that relate to possible marketing communication objectives, as specified in table 3:

Table 3: Pulsar questionnaire (translation ²) and correspondence with marcom objectives

<i>"This means of communication:</i>	Range	Specific
- can give a brand a good image	Engagement	Evaluation
- can make a brand dynamic	Awareness	Impact
- can show the popularity of a brand	Engagement	Evaluation
- can present novelties	Awareness	Innovation
- allows companies to address, ask questions to consumers	Awareness	Impact
- can encourage conversations amongst consumers	Shareability	
- encourages dreaming	Engagement	Evaluation
- can help consumers choose	Act	Trial
- gives the consumer the chance to develop their status	Engagement	Status
- brings people into direct contact with the brand	Act	Proximity
- gives the brand the chance to reward customers for their fidelity	Loyalty	
- allows brands to do their customers a service		
- gives brands the chance to show that they take their customers' expectations into account	Engagement	
- gives the impression that the brand is omnipresent	Awareness	
- gives brands the chance to ask consumers about their purchasing habits	Act	Consideration
- gives brands the chance to be in the right place at the right time	Engagement	Relevance
- gives brands the chance to be present in their consumers' thoughts	Awareness	
- stimulates consumers' curiosity."	Engagement	Trigger

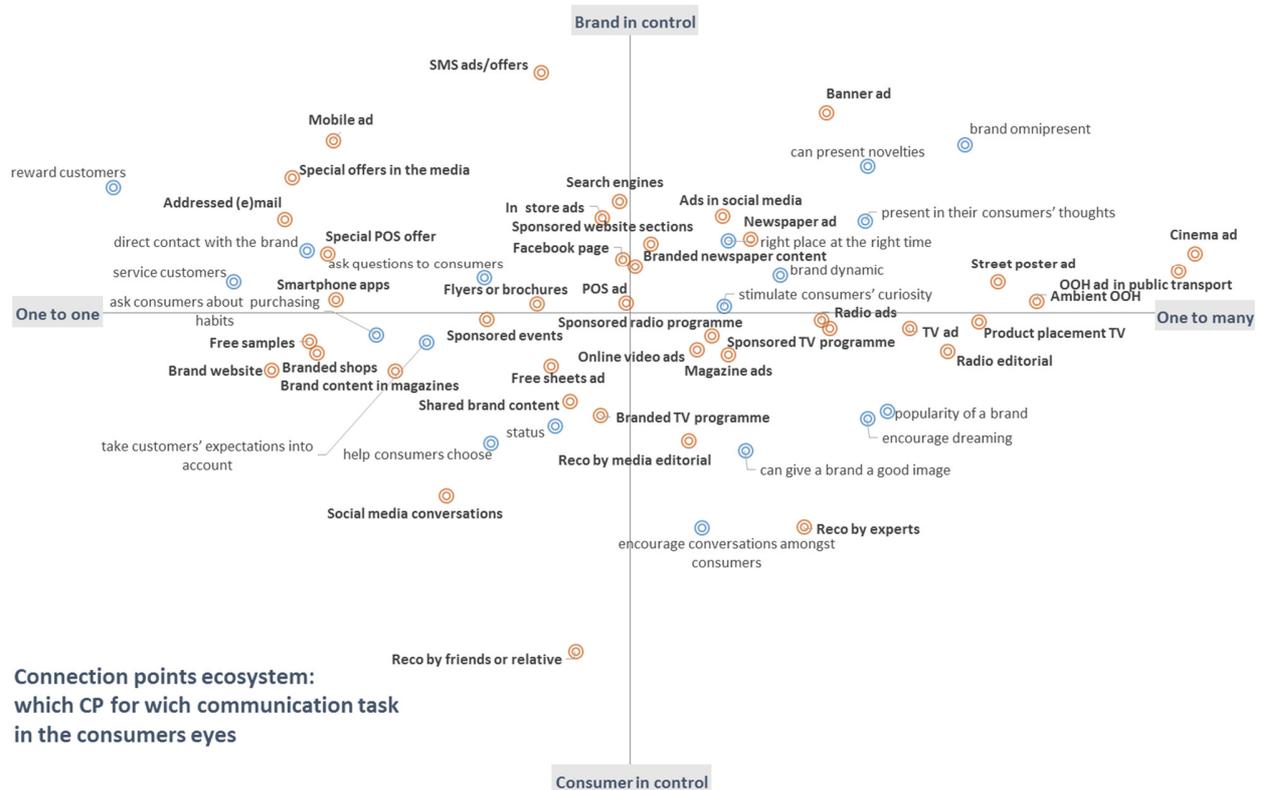
One thing is common to Pulsar 1 and 2.a: connection points characteristics are **not linked to a particular category** like most of the existing touchpoints surveys do. The analyses and recommendations are therefore related to **strategic tasks** and may apply to any product category. One must only adapt the corpus of connection points in some cases: for instance, in a recent recommendation for an automotive brand, "free samples" were not considered since such a communication means obviously does not apply.

² The language of actual questionnaires is either in Dutch or French. English translations are for analysis purposes, but not as such used with respondents. Order of the questions is the one in the questionnaire, but of course their presentation to respondents is randomized in the actual data collection process.

REMARKABLE STABILITY

By using the average scores for each of the connection points, it then becomes possible to unveil an ecosystem of the means of communication, via a correspondence analysis (cumulated inertia for factors 1&2 = 53%). Said ecosystem is shown in figure 1, which is fairly similar to the graph drawn from Pulsar’s first wave. It positions all the items along two axes: a ‘one to one/one to many’ horizontal one, and a vertical one opposing brand and consumer control of the communication process. Like in the first Pulsar survey, traditional mass media appear rather on the right, while the most personalized one is on the left. There are also some paradoxes, as with the digital – hence interactive – connection points (mobile ad, internet banners...), in relation to which the respondents believe that it is rather the brand that is in control: in short, ‘wherever I want, whenever I want’ does not seem to apply there.

Figure 1: mapping Pulsar connection points & perceived communication tasks



Compared to the first edition, the stability of the positions is remarkable. There is at least one exception: online video advertising has evolved. Indeed, the consumer still perceives it as a more individualized experience than television, but today it is considered to be better mastered, which is probably due to the fact that pre-roll videos (often) allow for the advertising to be skipped after a few seconds.

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A—GENERAL — MEASURE OF ATTENTION

As with all other elements of the Pulsar survey, the attention question has not been put to all respondents. On average, for each of the connection points that have been examined, the data originate from about a thousand individuals (989 to be precise).

Attention is not constant: depending on the case, the situation, the potential combination of activities, the focus on a medium or a point of contact can vary. Yet, we have captured the attention as a unique measurement, asking the respondents, however, to give their opinion using a fairly large scale, from 1 (low attention) tot 10 (maximum focus). The purpose, then, is to identify for the respondents, without too much trouble, a usual situation of attention to advertising messages. The inevitable risk being that this ‘average’ measurement does not apply everywhere and all the time.

Moreover, the way the question was being asked sometimes varied, depending on the connection point: thus, for the traditional media, attention was the operative word. For example, in the question pertaining to the radio commercial: *“When I listen to the radio, when I hear an advertising commercial, I pay attention to the message transmitted by the brand.”* There are variations, depending on the connection points under study: thus, with the smartphone applications, the questionnaire evoked the download as an ‘attention’ variable, and in the case of free samples, this time it was their use that was being referred to. From a strictly purist perspective, these alterations destined to be understood and correctly interpreted by the interviewees constitute another limit.

Consequently, **the attention** as measured in Pulsar is **declared, of a general scope** (does not relate to the context), and **based on conscience** (as opposed to the ‘low attention’ that constitutes another possible form of the consumer’s engagement ³).

Hence, for each of the connection points one obtains a panel of attention scores that can express themselves either by individual level (from 1, low or no attention, to 10, maximum value), or in weighted averages.

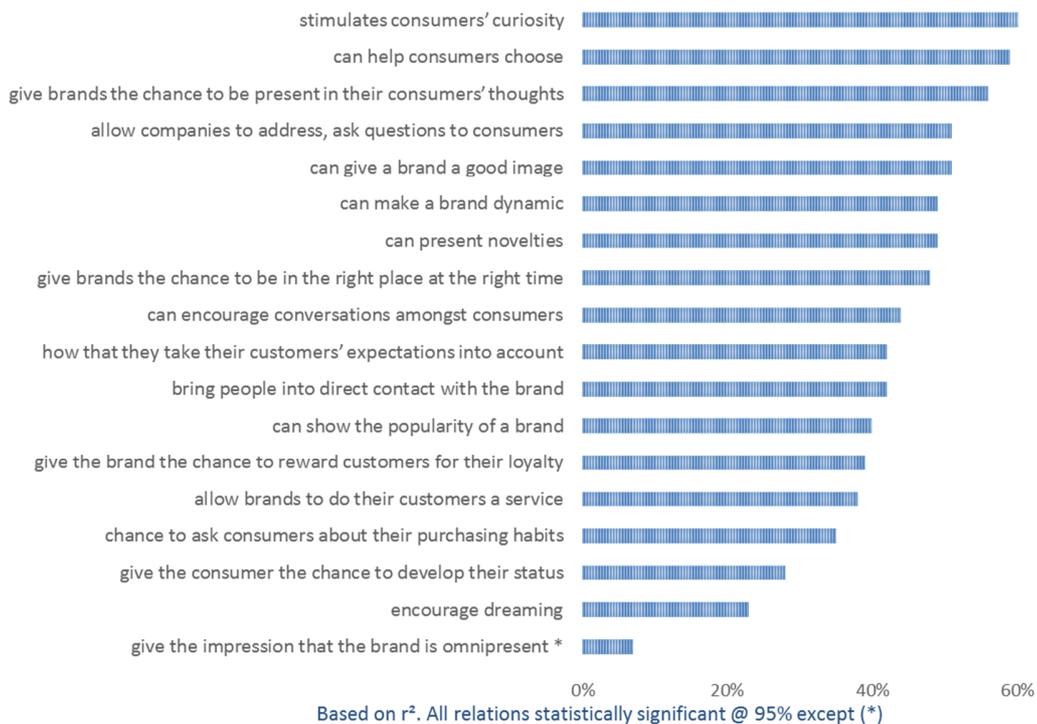
Over the whole sample, the average attention scores that were collected vary between 3.85 and 7.3 depending on the connection points. These apparently proximate values must not conceal the fact that the average attention score of any connection point as studied in Pulsar displays a statistically significant ($\alpha=0.05$) difference with more than 30 others: in other words, we thus possess a very discriminating metric.

³ Certain studies have demonstrated that low attention could also turn out to be efficient, which sometimes explains the audiovisual media’s effect, which has a very powerful impact on emotions. See for example: Heath 2009.

It may further be observed that there is a strong correlation between the ‘Pulsar version’s’ attention and the various connection points’ capacity to generate an effect: in particular, as pointed out in figure 2, **high attention scores are likely to arouse strong cognitive responses, like curiosity, the ability to choose between brands or the brand awareness.** Conversely, and unsurprisingly ⁴, an emotional response (“encourages dreaming”) is less probable in a context of consciously high attention. Statistically, there is no link between high attention and the feeling of omnipresence of the brand with the consumer.

Figure 2: correlations communication tasks vs attention values for all connection points

Attention value to communication tasks

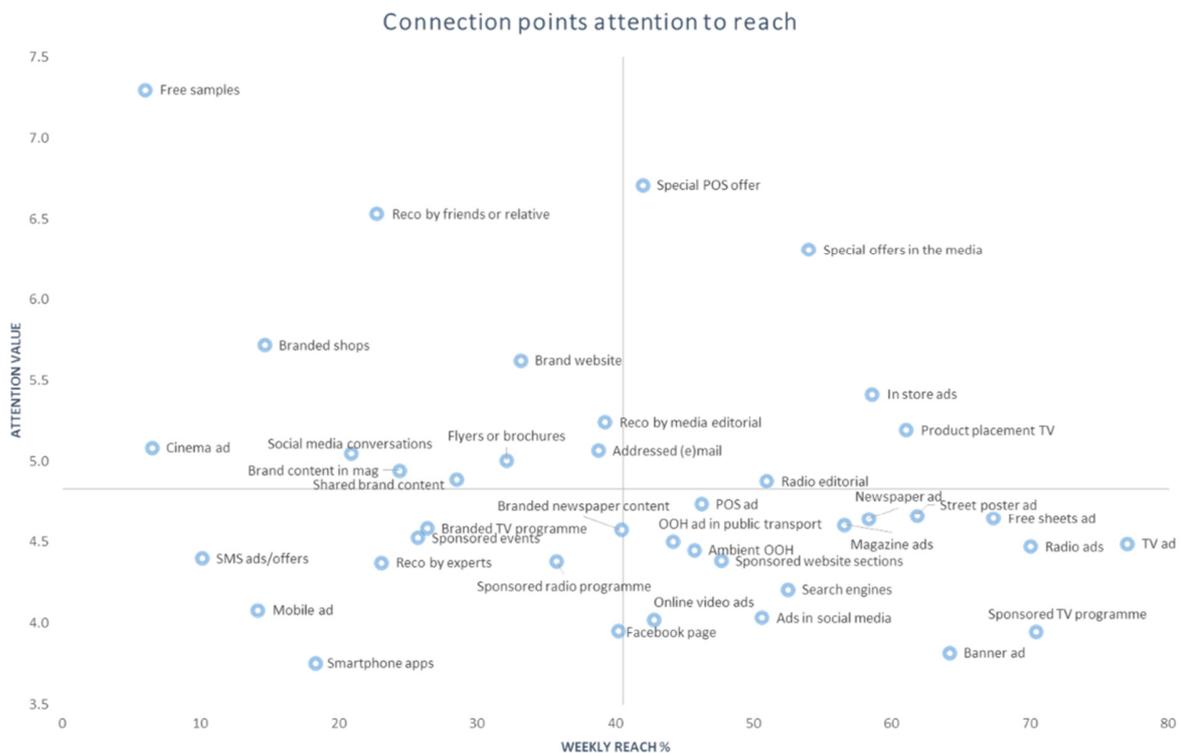


The attention value is also a profile. Globally, **the youngest individuals** (say that they) **pay the most attention to the brands’ messages.** Which their elders are reluctant to admit. Highly educated and upmarket individuals do not declare being highly attentive to commercial connection points either. Do they behave exactly how they say? For magazine ads, if we refer to the Stop/Watch analysis made by Medialogue (Hermie et Al, 2005-96), the global impact of

⁴ Perception operates on two levels: an automatic ‘system 1’, rapid and emotional, but not always very conscious (with little conscious thoughts), and a ‘system 2’, cognitive, more rational, requiring more efforts and hence slower (Binet & Field, 2013). Consequently, the conscious attention we measure, is rather ‘system 2’.

And what about attention in all this? It can be crossed with the average weekly exposure frequency, as in figure 3. The mapping details each of the connection points in terms of power (the average weekly reach) and average attention score on the whole of the respondents. Classically, traditional media deliver a critical mass of connections, and are therefore positioned rather on the right. However, their attention value is proportionally lower. In terms of attention, digital media are awarded a fairly low score ⁵, in spite of the online survey method that has been used, or... because of it ⁶! Immersive experiences like the brand site or flagship stores, gifts and the interpersonal realm work better. But one still needs to trigger these conversations, and to bring people to get to know these samples and others, in a cost-effective manner. That is where a mix of powerful channels and other attention creators proves to be relevant.

Figure 3: perceptual reach vs average attention, all connection points



⁵ A recent Millward Brown’s global study (Millward Brown 2014) reveals a lower attention value for digital screen advertising (on laptop, smartphone or tablet) compared to TV screen advertising: if television is set at index 100, the value for digital communication is at 72: The difference measured in Pulsar is smaller.

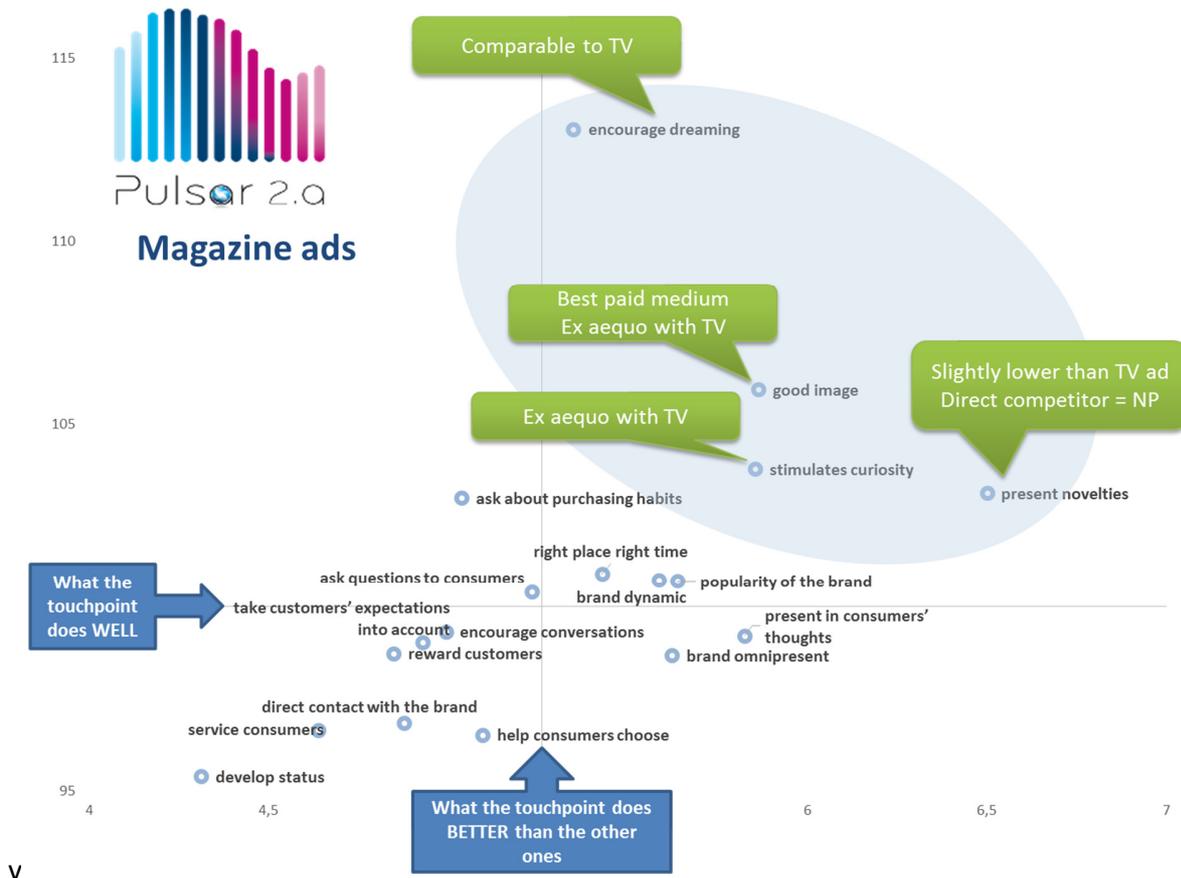
⁶ Eye tracking experiments have shown that experimented surfers tend to avoid screen segments where they know advertising messages to be present (Van Meerem & Al 2009). Provided that the Pulsar respondents’ group consists of a lot of ‘heavy internet users’, this effect may have come into play.

TV AND MAGAZINE ADS, SURPRISINGLY CLOSE, FOR CONSUMERS

A common way to analyze connection points' assets in communication is to plot them against the average value given by consumers to each of the 18 statements listed in table 3. The absolute value is given by axis X while the vertical axis is based on the index of the individual score of the channel compared to the average of all other touchpoints. As shown below in figures 4 and 5, the horizontal axis shows what the connection point does well, while one may see vertically what each medium or touchpoint does better (or worse) than all the other ones.

According to Pulsar 2.a, magazine ads are best suited to present new products, brands or services. And they do it slightly better than (all other) connection points. In this awareness building task, they directly compete with newspapers and perform a little less than TV ads. Next to this, magazine ads increase engagement towards brands: they improve evaluation ("encourage dreaming", "give a good image"), and may also trigger attitudinal responses ("stimulates curiosity"). In short, they seem to be a means both to communicate "new news" and create or improve "mental availability" (Sharp 2010). Sounds obvious? Remember that this assessment comes from consumers, not marketers.

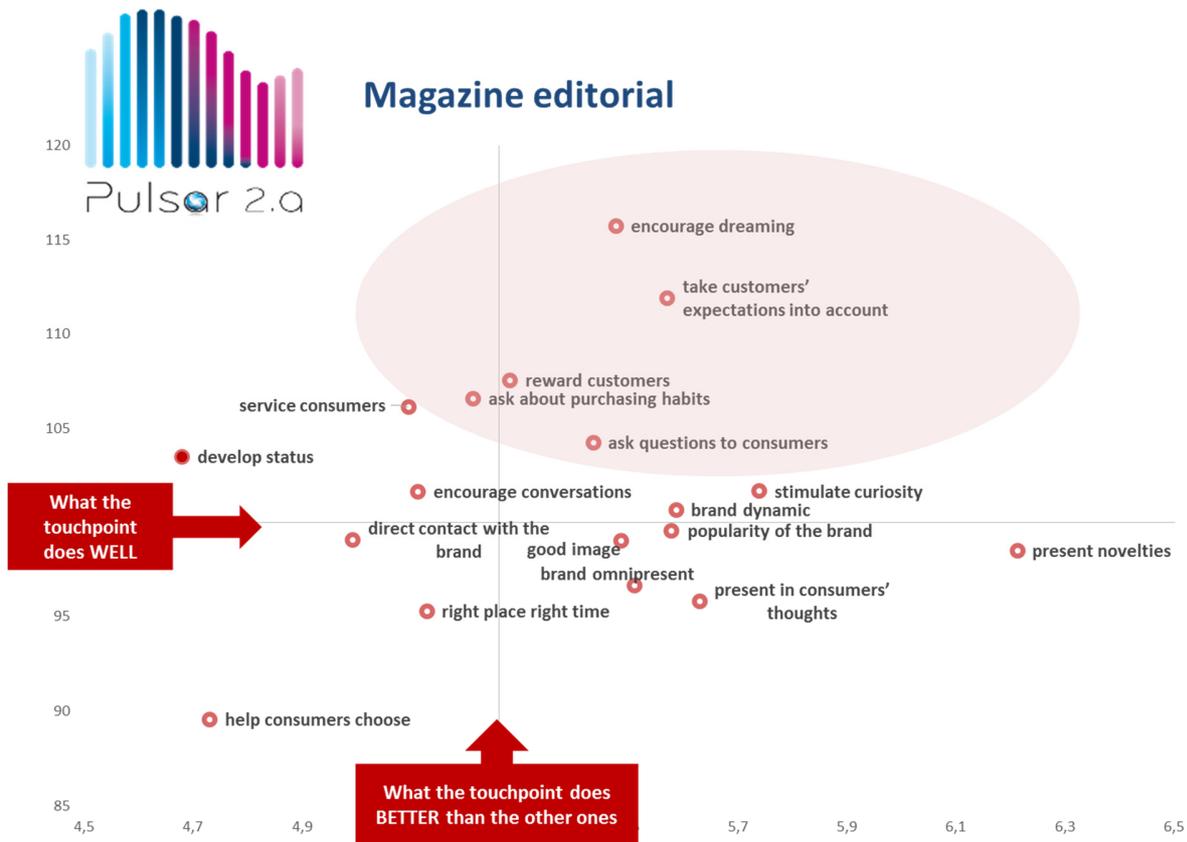
Figure 4: mapping magazine ads perception based on the 18 statements.



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Since the questionnaire made a distinction between ads and brand content or editorial, figure 5 plots the evaluation of brand content in magazines compared to the 18 statements. The positive effect on engagement towards brands is shared with magazine ads. Magazine editorial also may create, better than other touchpoints, direct interactions between brands and their consumers. “Present novelties” is the biggest asset of magazine editorial, but its more limited value makes it not specific (index 99).

Figure 5: mapping brand content in magazines perception based on the 18 statements.



As already illustrated in figure 1, TV and magazine ads are generally speaking fairly comparable on the axis “control”, but when both are seen on the horizontal axis (to remind: distinction between “one to one” and “one to many”) magazine ads are considered a relatively more intimate experience.

Now focusing on details of magazine ads and TV commercials as evaluated by all respondents, we discover patterns that are pretty close to one another. Figure 5 compares both media on the 18 items related to communication tasks by means of their average values on each the evaluation statements. Figure 5 also indexes both media to the average value for all paid media. Both magazine and TV ads seem almost equally appropriate to provide brands with image benefits, prompt emotions and increase consumers’ willingness to learn about the

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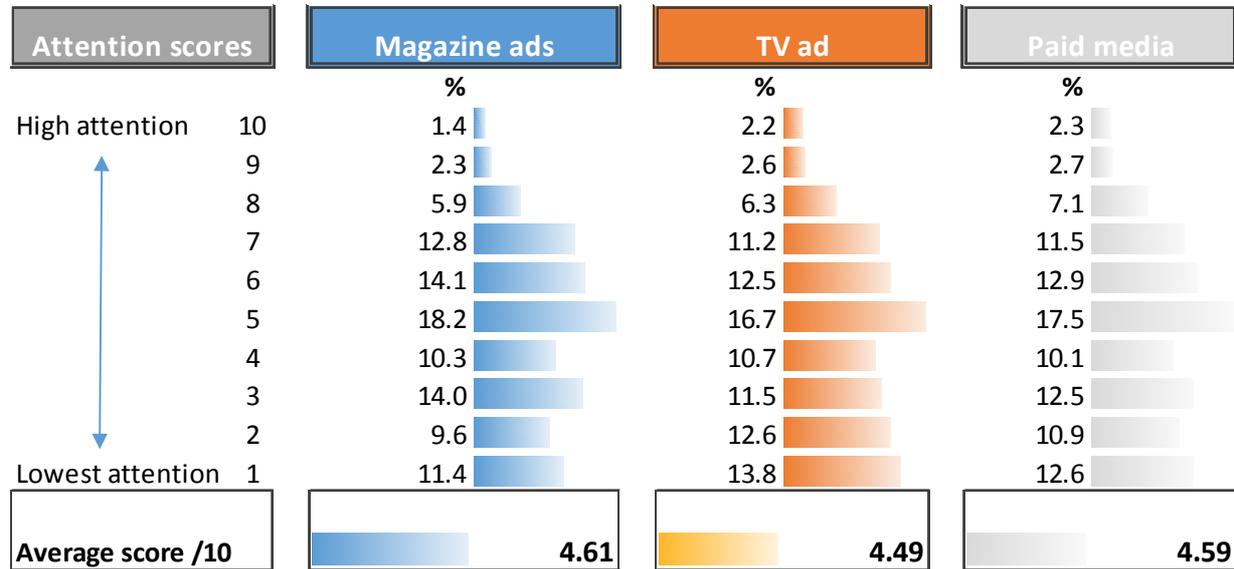
brands. Not surprisingly (see supra) magazine ads performs better on direct interaction between brand and consumer while TV is more about dynamism, omnipresence and popularity. But the differences are not huge. The signature of both media is also compared to the “average connection point” are very similar, but obviously not identical. Note that newspaper ads show much more differences vs TV than magazine ads do.

Figure 6: comparison magazine & TV ads on average scores per communication task



When it comes to attention value , there again is pretty much of a similar pattern between both media, if we compare the distribution of scores (to remind: respondents were asked to evaluate to what extent they paid attention to the proposed connection points, by means of 1 to 10 points scale). In terms of average score, magazine ads perform a little better than TV but with a t-value of 1.01, the difference is far from being significant.

Figure 7: comparison magazine & TV ads on attention assessment



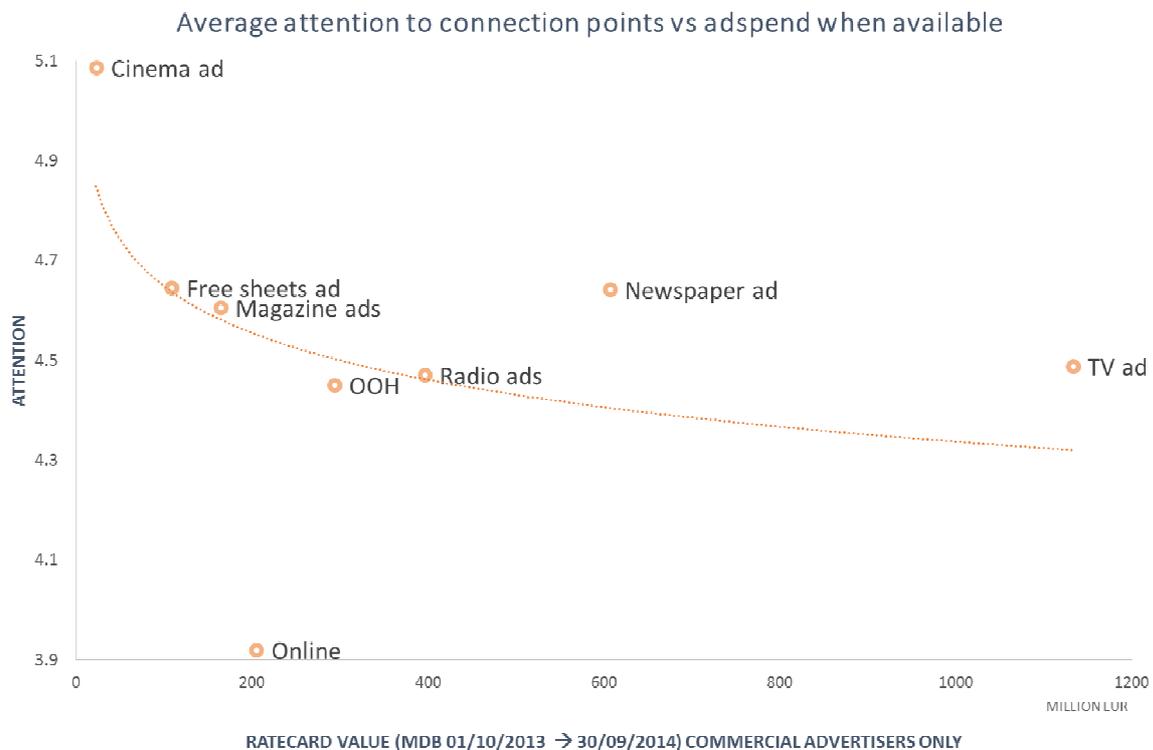
This very proximity between television advertising and magazines may explain why the “best match” in effectiveness between media proves to be... those two, ahead of other combinations of major paid media, such as TV+out of home or TV+radio (Consterdine, 2014).

At this stage, it seems there is a **mismatch between the perception of consumers** who see TV commercials and magazine ads as functionally equal (except their perceptual reach) **and the** over the years **consistent disregard of magazine advertising by advertisers**. Before the turn of the century, it was already pointed out that “Magazines have simply become a poor relation in which advertisers under-invest creatively, in both research and dollars. Print schedules are seen as background” (Broadbent, 1999). In a (more recent) period of 10 years, from 2005 to 2014, magazine share of net investment has been cut by half in Western Europe and in Belgium, and decreased by 45 percentage points worldwide (GroupM, 2014).

Looking at the current status of (gross) adspend in Belgium we crossed the available values with the average attention to the connection point, like below on figure 7. There seems to be an reverse relation between the overall budget allocation and the average attention value. Note that the correlation is poor, with online and newspapers definitely being outliers. But the mismatch between advertisers and consumers seems obvious and it should be investigated whether the disregard could not be linked with differences in the granularity of audience (and advertising impact) measurement, especially when it comes to the difference between TV and magazines: for consumers advertising experience may look similar, while for advertisers, the measures they get are fairly different. The appeal of digital to advertisers –with plenty of measures- might also be explained by the availability of granular data, while from the consumers’ point of view, communication of brands on digital platforms do not focus much attention.

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Figure 8: adspend in media vs average attention levels



RESULTS COME FROM AN MEDIA-AGNOSTIC SURVEY

As such the results from Pulsar are no revolution: we have been able to connect or correlate them with many existing surveys or facts. The point with the Pulsar data is that they identify the assets of magazines (not only the traditional page ad) in a wide range of possible competitors. Traditional mass media, one-to-one, indirect: all these possible connections between brands and consumers have been analysed in a neutral and homogeneous way, allowing direct comparisons. In doing so Pulsar (first or second) goes further than many existing surveys on the perception of magazines or even media by consumers (fi Callius et Al, 2013, Magazines.nl 2012, to name a few). Finally, the point of view taken by Pulsar, with its original Discover/eNgage/Act funnel is also something unusual. **The assets we identify for magazines in marketing communication come therefore from a new perspective**, even if the insights gathered are not fundamentally “new news”.

Finally it must be noted that the Pulsar conclusions have been **widespread in the Belgian market**:

- It has become a standard strategic tool for the clients at Space, that is the largest individual media agency in Belgium

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- Results have been shared with major media representatives, resulting in trade press coverage and reports in trade bodies newsletters and/or websites
- The first wave of Pulsar has been awarded as (second) best media research in Belgium, anno 2013.

Conclusions drawn on magazines advertising are therefore well known and applied in day-to-day business decisions.



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